

Table of Contents

Election Setup	2
Key Terms	2
SVRS Election Cycle Checklist (Election Set-Up Portion)	3
Create a Polling Place Assignment Plan	4
Add Details to a Polling Place Assignment Plan	5
Consolidating Districts into one Poll List	7
Create a Reporting Unit Plan	8
Add Detail to a Reporting Unit Plan	9
Setup an Election	10
To Inherit an Election	10
To Create an Election	11
Check Milestone #2 - Activate the Election.....	14
Contests	15
Add a Contest for Elected Office	15
Add a Contest for a Referendum.....	18
Search for and Update a Contest.....	19
Candidate Filings.....	20
Add a Candidate Filing.....	20
Track Candidate Filings Status in SVRS (Optional).....	22
Search for and Update a Candidate Filing	27
Check Milestone #3 - Ballot Setup Finalized	28
Generate Ballot Styles.....	29
Check Milestone #4 - Ballot Styles Finalized	30

Election Setup

The Election Setup chapter outlines the tasks clerks must perform to manage an election using SVRS.

Key Terms

Ballot Style: Ballot Style refers to the unique set of Contests and Candidates that will appear on a given voter's ballot. All voters with this exact same set of Contests and Candidates will have the same Ballot Style in SVRS, regardless of ward. Two voters whose ballots differ by even one Contest will therefore require different Ballot Styles.

Ballot Styles are created in SVRS at the municipal level, either by a Self-Provider or by a Provider for a Relier.

At present, the term 'ballot style' as used in SVRS is different and independent of the external ballot creation software. If your external ballot software generates a different 'ballot style' based on voting wards even if they share the same unique combination of contests and candidates, your external software will generate more 'ballot styles' than those generated in SVRS. SVRS does not create or print the actual ballots.

Contest: A race for elected office or a referendum question.

Election Inheritance: Election inheritance is the concept of sharing election administration across government units using SVRS. For example, the State is responsible for setting up the Spring Primary, Spring Election, Fall Primary and General Election. Counties will then 'inherit' (or choose) the election that the State has created to get the benefit of entry done by the State. Self-Providers and Providers on behalf of their Reliers then 'inherit' the election from the County, thus benefiting from the work done at the State and County level.

Election Owner (also known as 'Owner Jurisdiction): The election owner is the jurisdiction that created the election. An Election Owner will be the State (GAB), a County, or a Municipality, depending on the highest of these levels with a contest on the ballot at the election. School District contests are setup at the County level.

Election Setup Wizard: The Election Setup Wizard collects information about the election, whether you are inheriting an election or creating an election from scratch.

Milestone: Milestones represent major points in the SVRS election cycle that reflect and can affect the status of the election. See the following page for more information about election milestones.

Polling Place Assignment Plan: The Polling Place Assignment Plan (PPAP) is a reusable template that contains information about the wards, workers and supplies used at a polling place. The Polling Place Assignment Plan also affects how your poll books are printed and connects to the Voter Public Assistance website. Consequently, you may have one PPAP you use for Spring Elections and one for Fall Elections - if you print your poll books differently during those specific election cycles.

Reporting Unit: A single ward or grouping of wards that collect and report election results entered into SVRS.

Reporting Unit Plan: Like Polling Place Assignment Plans, Reporting Unit Plans can be created and saved to be used during Election Setup. The Reporting Unit Plan also connects to the G.A.B. Canvassing System and affects how you will enter your results on that site. You must incorporate a Reporting Unit Plan into your election to be able to generate a results set and use SVRS to report canvassing numbers.

The full SVRS Election Cycle Checklist (see [Appendix B](#)) outlines the steps clerks must perform to manage an election using SVRS. This page presents only those steps of the check list needed to setup an election.

SVRS Election Cycle Checklist (Election Set-Up Portion)

Milestones and Activities	Details
<input type="checkbox"/> 1. Create or Inherit an Election <input type="checkbox"/> ▪ Counties Inherit the Election from the State; Municipalities Inherit the Election from their County or Counties <input type="checkbox"/> ▪ Assign Polling Place Assignment Plan and Reporting Unit Plan	<ul style="list-style-type: none"> • Before creating or inheriting an election, verify that you have added Polling Place Locations and created a Polling Place Assignment Plan • Before creating or inheriting an election, verify that you have created a Reporting Unit Plan
<input type="checkbox"/> 2. Check Milestone 1: Election Setup	<ul style="list-style-type: none"> • Milestone 1 is automatically marked complete when the user completes the Election Setup Wizard
<input type="checkbox"/> 3. Check Milestone 2: Election Active	<ul style="list-style-type: none"> • When Milestone 2 is checked, users can proceed to enter contests and candidates for that election
<input type="checkbox"/> 4. Enter Detailed Election Information <input type="checkbox"/> ▪ Add Contests <input type="checkbox"/> ▪ Add Candidates	<ul style="list-style-type: none"> ▪ Before entering a contest for an elected position, you must setup a corresponding Office Type ▪ Clerks only need to create an Office Type for a position once, and can reuse it from election to election
<input type="checkbox"/> 5. Check Milestone 3: Ballot Setup Finalized Checked to signify that the clerk has accurately entered all contests and candidates for that election	<ul style="list-style-type: none"> • Clerks may not make changes to contests and candidates while Milestone 3 remains checked • In an inherited election, the election owner must be the first jurisdiction to check milestone three, followed by any inheriting jurisdictions in the following order: State -> County -> Municipality
<input type="checkbox"/> 6. Generate Ballot Styles	<ul style="list-style-type: none"> • Clerks must do this step for voter names to print on poll books
<input type="checkbox"/> 7. Check Milestone 4: Ballot Styles Finalized	<ul style="list-style-type: none"> • Clerks may not make changes to ballot styles while this milestone remains checked • Do not make any changes to District Combos after generating ballot styles and before Election Day • After Milestone 4 is checked, you may begin generating absentee ballots and poll books

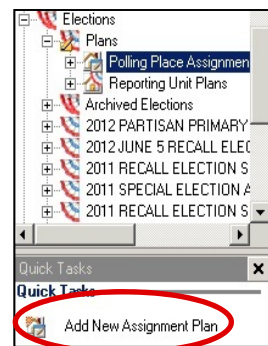
Create a Polling Place Assignment Plan



A Polling Place Assignment Plan (PPAP) is a reusable template listing the polling place locations, election workers, and supplies needed for a certain type of election. You can create and maintain multiple PPAPs if different types of elections use a different number of polling places or different polling place locations.

Prior to setting up a Polling Place Assignment Plan, you should create your Polling Place Locations and (optionally) Election Workers in SVRS. See the [Polling Places](#) and [Election Workers](#) chapters for more information.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** sub-node.
3. Click **Polling Place Assignment Plans**.
4. Click the **Add New Assignment Plan** Quick Task to open the **Polling Place Assignment Plan – Add** form.



5. In the **Assignment Plan Description** box, type a name for the Plan.

6. In the **Setup Reporting Units Based on this District Type** list, select **Ward**. All Polling Place Assignment Plans should be based on wards.
7. Click **Save and Close** button.

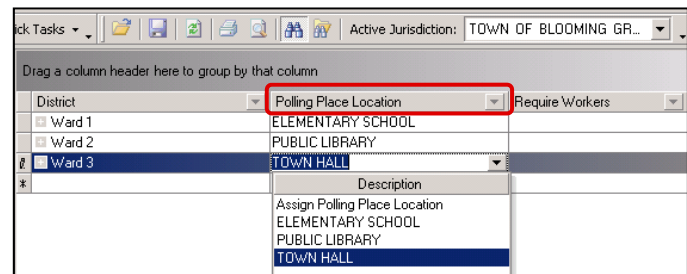
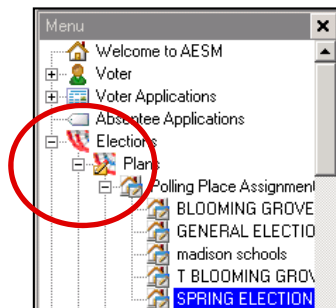
Add Details to a Polling Place Assignment Plan



After creating a Polling Place Assignment Plan, you must add details to tell SVRS which voting districts that polling place serves on election day. If you do not, your poll lists will not contain any names.

You may also add details about the election workers and supplies that the polling place needs for an election. Adding election workers and supplies is optional.

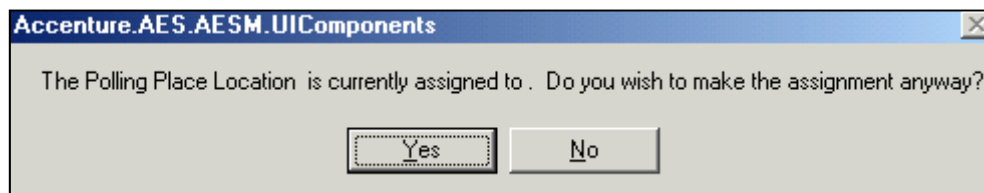
1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** sub-node.
3. Expand (+) the **Polling Place Assignment Plans** node.
4. In the menu tree, click on the name of the PPAP to which you wish to add details.
5. Assign a **Polling Place Location** to each district on the grid.
 - a. Click in the first empty box immediately below the **Polling Place Location** field name.
 - b. Click the drop-down arrow and select the **Polling Place Location** serving the district listed on that row of the grid.
 - c. Repeat for each District in the grid.



Assigning polling places to an assignment plan affects the poll books for elections using that plan. SVRS will print one poll book for each row in your plan, containing the names of all the voters residing in the district or districts listed in the **Districts** column.




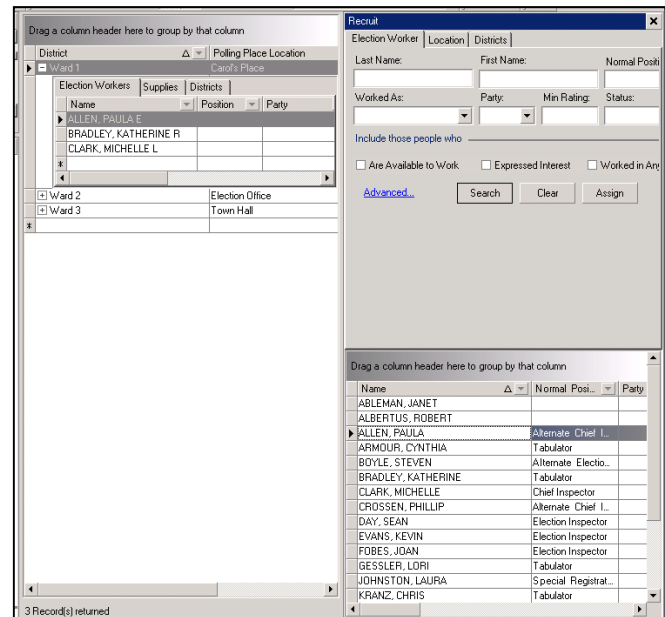
If you add the same polling place to two different Districts, you will receive a message noting **The Polling Place Location is currently assigned to. Do you wish to make the assignment anyway?** (Click **Yes**, unless the duplicate assignment is a mistake).



Adding the same polling place to two or more districts listed on two or more rows will not produce a single list containing the names of all voters in those districts. To print in a single list, all districts must be added to a single row. To combine voters from different districts on the same poll list, follow the instructions for Consolidating Districts into one Poll List, starting on page 7 of this chapter.

6. Assign **Election Workers** to Polling Place. (Optional)

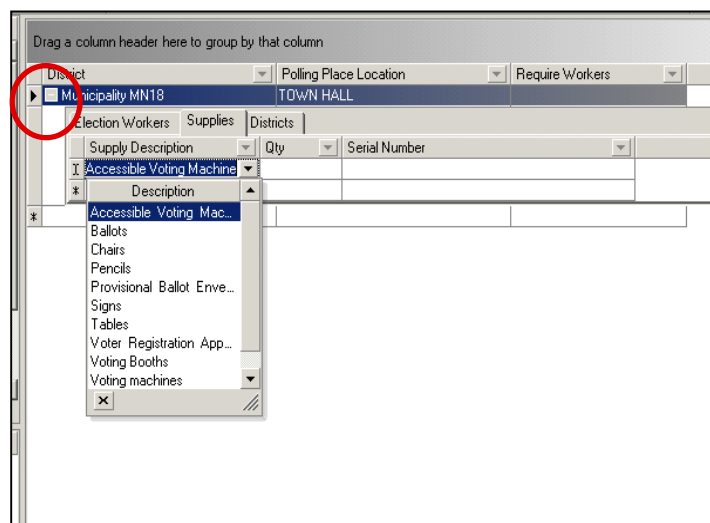
- Expand (+) the **District** to which you wish to assign poll workers.
- Click the **Election Workers** tab.
- Click the **Recruit** icon  on the toolbar to open the **Recruit** pane.
- In the **Recruit** pane, click the **Election Worker** tab.
- Click on the name of an **Election Worker** on the **Recruit** pane data grid and click **Assign**.
- Repeat this process for all election workers at each polling place.
- Close [x] the **Recruit** pane.




Only people for whom you have added **Election Worker** records will appear in the data grid on the **Election Worker** tab of the **Recruit** pane. See the [Election Worker](#) chapter of this manual for directions on how to add these records.

7. Assign **Supplies** to a Polling Place. (Optional)

- Expand (+) the **District** to which you wish to add supplies.
- Click the **Supplies** tab.
- Click in the first blank field in the **Supply Description** column.
- Click the drop-down arrow and select a type of supply.
- Type an amount of the supply in the **Qty** box.
- Type a **Serial Number** or other identifying information.
- Repeat for each supply at each polling place.
- If the supply you wish to add isn't available in the **Supply Description** drop-down, you may enter a quantity in the **Qty** column and enter the type of supply in the **Serial Number** field.



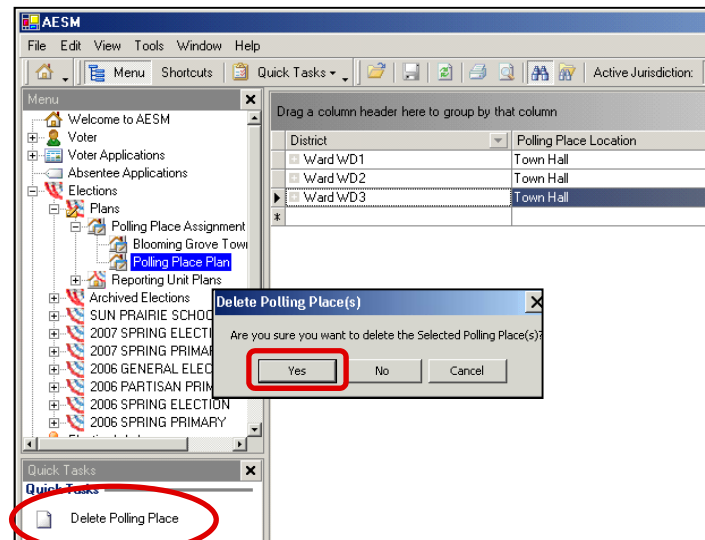

Any changes made to the details of a polling place assignment plan are saved automatically.

Consolidating Districts into one Poll List



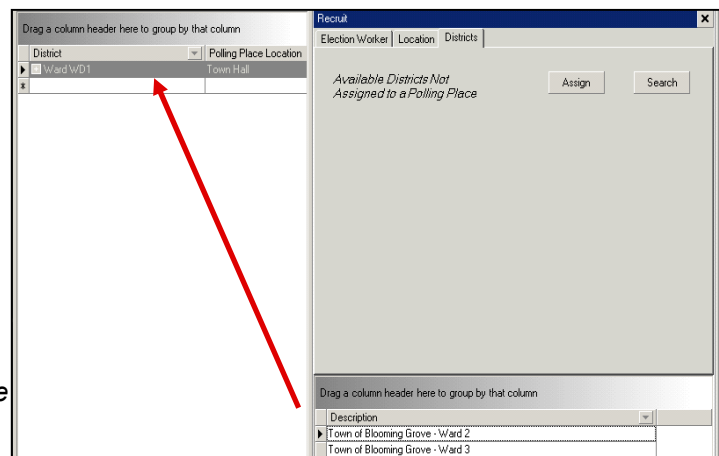
Any time a polling place location is used by multiple wards that report election results as a single unit, those districts can be consolidated within a PPAP. By doing this, the poll books you print will contain the names of all voters in those wards, listed in alphabetical order. If you prefer to have separate poll books for each ward sharing a polling place location, do not consolidate districts.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** sub-node.
3. Expand (+) the **Polling Place Assignment Plans** node.
4. Click the name of the plan in which you wish you consolidate districts.
5. Click on the row in the data grid for one of the **Districts** that you wish to consolidate.
6. Click the **Delete Polling Place** quick task.
7. SVRS will ask you to confirm your action, click **Yes**.
8. Repeat **Steps 5-7** for all but one of the districts you wish to consolidate.
9. Click the **Recruit** icon on the toolbar to open the **Recruit** pane.
10. Click the **Districts** tab in the **Recruit** pane.
11. In the data grid of the **Recruit** pane, click on the district that you want to consolidate and drag it to the **District** box containing the ward it will join.



You can also assign wards to the plan by:

- On the main data grid, click the row where you would otherwise have dragged the districts you wish to consolidate
- On the **Districts** tab of the **Recruit** pane, click the ward
- Click **Assign**




12. Repeat **Step 11** until all wards are assigned to a polling place.

Cons:, meaning “consolidated” will appear in the **District** box for any row on which you have assigned multiple districts to a single polling place.

District	Polling Place Location	Require Workers
Cons: WD1, WD2, WD3	Town Hall	

13. Close [x] the **Recruit** pane.

Create a Reporting Unit Plan

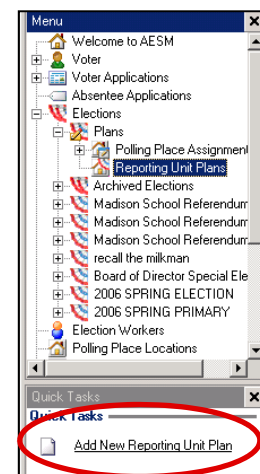
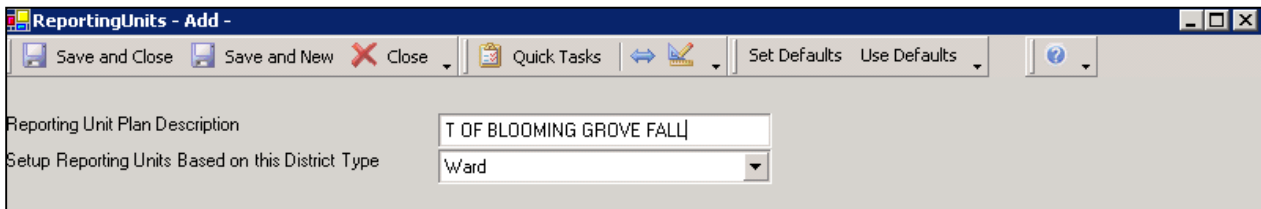
-  Following each election, municipal clerks report the results of the election to their county clerk. In order to capture election results in SVRS, you must first tell the system how your municipality reports election results. The first step in this process is creating a reporting unit plan.

Reporting units are the ward or combination of wards by which a municipal clerk reports their election results to their county. Reporting units may change from election to election depending on what races are on the ballot. Your county clerk will be able to assist you in determining your municipality's reporting unit(s).

In SVRS, a reporting unit plan acts much like a Polling Place Assignment Plan (PPAP) by allowing you to create a reusable template to which you can add details about how you report election results for a particular type of election. When you create a reporting unit plan for a particular type of election in SVRS it should match with how you report your results to the county and how your polling place assignment plan (PPAP) is setup for the election.

1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** sub-node.
3. Click the **Reporting Unit Plans** node.
4. Click the **Add New Reporting Unit Plan** Quick Task to open the **Reporting Units – Add** window.
5. In the **Reporting Unit Plan Description**, type a description for your plan. The name can be anything that you will recognize as a plan to use for a specific type of election.

For example, if you report election results differently based on whether it is a Spring or a General election, you would want two plans, one named **Spring**, and the other named **General**.

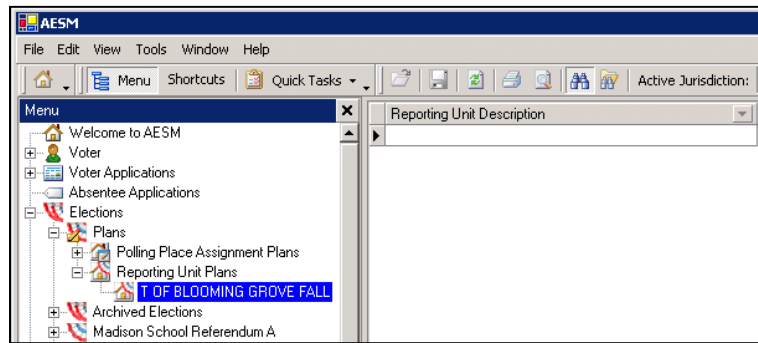
6. In the **Setup Reporting Units Based on this District Type** list, select **Ward**.
7. Click **Save and Close**.

Add Detail to a Reporting Unit Plan



After creating a Reporting Unit Plan, you must add details about your specific reporting units. These details list which ward or group of wards are contained in which reporting unit(s).


1. Expand (+) the **Elections** node.
2. Expand (+) the **Plans** sub-node.
3. Expand (+) the **Reporting Unit Plans** node.
4. Click on the name of the plan to which you wish to add details.



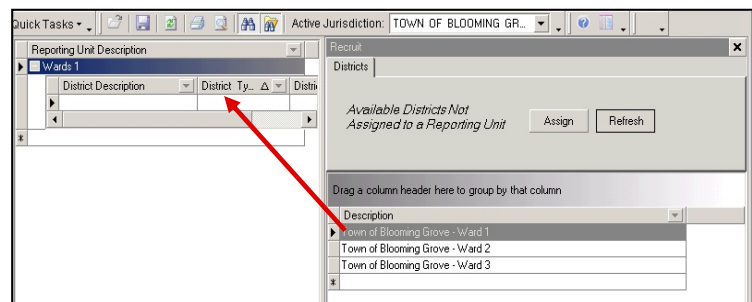
5. Click in the first empty box under the column named **Reporting Unit Description** and type in the name of a specific reporting unit.



- a. The convention for naming a reporting unit is Ward # (or Wards # - #).
- b. Repeat this step for your remaining reporting units, entering each name into successive rows on this screen.

6. Click the **Recruit**  button in the toolbar to open the **Recruit** pane.

7. In the Recruit pane, click the **Districts** tab.
8. To associate your wards with the correct reporting unit:



- a. Click on a district in the **Recruit** pane data grid and drag it into the box with the name of the **Reporting Unit** with which you wish to associate that ward.
- b. Repeat this step until all wards are associated with a **Reporting Unit**.



Alternatively, you can assign wards to a reporting unit by:

- On the main data grid, click the row to which you want to add districts
- On the **Districts** tab of the **Recruit** panel, click the ward
- Click **Assign**



Any changes made to the details of a reporting unit plan are saved automatically. If the RUP is changed after it has been adopted into an election, it will not automatically change in the election. The RUP must be adopted again into the election.

Setup an Election



In SVRS, you will setup an election in one of two ways: 1) By inheritance, or 2) By creating a new election.

Counties will inherit an election:

- Every election at which there is contest for a federal or state office, or a statewide referendum

Counties will create an election ONLY:

- When there are contests for County or School District offices or referenda and **no contests for state or federal offices or referenda**

Municipalities will inherit an election:

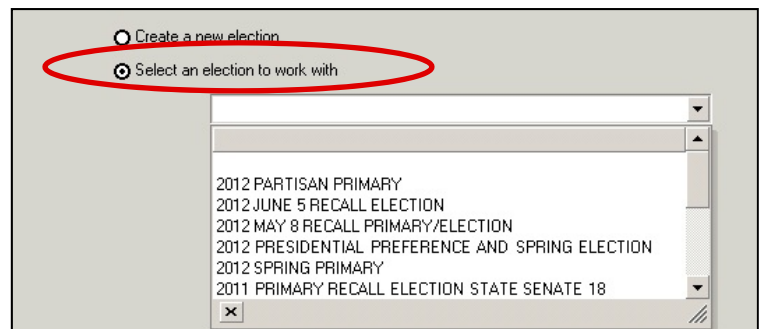
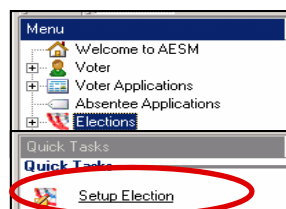
- Every election at which there is contest for a federal or state office, or a statewide referendum
- Every election at which there is a contest for a County or School District office or referendum

Municipalities will create an election ONLY :

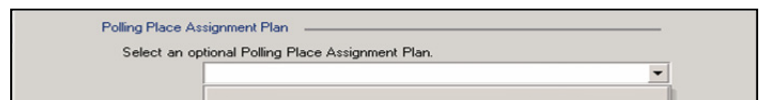
- When there are contests for municipal offices or referenda and **no contests for county, state or federal offices or referenda**

To Inherit an Election

1. Click the **Elections** node.
2. Click the **Setup Election** Quick Task to open the **Election Setup Wizard**.
3. Select the **Select an election to work with** option button.
4. In the **Select an election to work with** box, click the name of the election you wish to inherit.
5. Click Next.

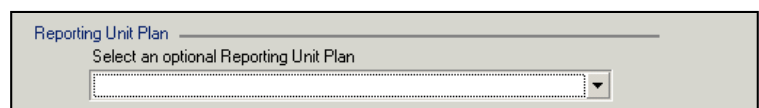


6. In the **Select an optional Polling Place Assignment Plan** box, click the name of the assignment plan you will use for the type of election you are inheriting. When setting up an election, counties will not assign a Polling Place Assignment Plan. The Polling Place Assignment Plan is assigned only when the election is setup at the municipal level.



7. In the **Select an optional Reporting Unit Plan** box, click the name of the plan you will use for the type of election you are inheriting. When setting up an election, counties will not assign a Reporting Unit Plan. The Reporting Unit Plan is assigned only when the election is setup at the municipal level.

8. Click Next.
9. Click **Finish**.



- a. By finishing the **Election Setup wizard**, you will be making this election available to work with, and will have automatically checked Milestone #1.

To Create an Election



- Counties should not create an election **when there are contests for state or federal offices or referenda**. Instead counties should inherit the election from the State. See page 10 for instructions
- Municipalities should not create an election **when there are contests for counties, state, or federal offices or referenda**. Instead municipalities should inherit the election from the County. See page 10 for instructions

1. To create an election clicks the **Elections** node on the Main Menu.

2. Click the **Setup Election** Quick Tasks to work within the **Election Setup Wizard**.

3. Click the **Create a new election** radio button.

4. Click **Next** to proceed to the **Election Basics** input screen.

5. Enter the following information:

a. **Date:** Date of election.

b. **As of Date:** Same as date of election (unless otherwise specified by the G.A.B).

c. **Description:** Name the election. Please start the **Description** with the year and describe the election type.

d. **Election Mode:** Leave as **Advanced**.

e. **Time of Poll Open:** 7:00 AM.

f. **Time of Poll Close:** 8:00 PM.

g. **Last Date for Absent. Issue:** One Friday after the election date.

h. **Registration Close Date:** Set to 20 days before the election date. This will allow SVRS to create a supplemental poll list.

i. **Effective Registration Date:** Set to 20 days before the election date. This will also allow SVRS to create the supplemental poll list.

j. **Voter Age Eligibility Date:** Leave defaulted to the election date.

6. Click the **Next** button to proceed to the **Election Detail** input screen.

7. In the **Election Type** box, select the type of election you wish to create – usually **Special Election** or **Special Primary**.

Election Type:

- Special Election
- Recall Election
- General Election
- General Election - Presidential
- September Partisan Primary
- September Partisan Primary - ...
- Special Election**
- Special Primary
- Spring Election
- Spring Primary
- Spring Primary - Presidential P...
- Spring Election - Presidential P...
- August Partisan Primary
- August Partisan Primary - Gov...

8. In the **Highest Government Level** box, select highest level with a contest on the ballot for that election.

Contests for school district offices and referenda are at the **County** level.

Highest Government Level:

- County
- Federal
- Municipality
- State

9. Select the **Polling Place Assignment Plan** and **Reporting Unit Plan** if setting up at municipal level. Do not select if setting up at county level.

Polling Place Assignment Plan

Select an optional Polling Place Assignment Plan.

BLOOMING GROVE 2012 PPAP

Reporting Unit Plan

Select an optional Reporting Unit Plan

BLOOMING GROVE 2012 RUP

10. Click **Next**.

11. On the **Participating Jurisdictions** screen:

Election Setup Wizard

Participating Jurisdictions

Select the jurisdictions that can participate in this election.

- ☒ Automatically determine Districts/Jurisdictions based on what contests are on the ballots
- ☐ All Districts/Jurisdictions in the state
- ☐ These selected Jurisdictions
- ☐ These selected Districts

- You may leave the **Automatically determine...** option button selected if there are any contests for elected office at that election.
- Use the **These selected Jurisdictions** button to select a jurisdiction. For example, if you have a special election for a municipal referendum, you would select this button, and then the correct municipality.
- Use the **These selected Districts** button to select a district. For example, if you have a special school district referendum, you would select this button, and then the correct school district.

12. Click **Next**.

13. Type a name in the **Short Nickname for Election** box.
14. Click **Next**.
15. Click **Finish**.

By finishing the **Election Setup wizard**, you will be making this election available to work with, and will have automatically checked Milestone #1.



You can edit your **Election Setup** information by highlighting the election in the Main Menu tree, and then clicking the **Change Election Setup** quick task.



Also, since the **Registration Close Date** and **Effective Registration Date** must be set to 20 days before the Election Day when you create an election, once you **print poll lists for the election you must then change the Registration Close Date and Effective Registration Date to the actual election date. This will allow you to enter Election Day Registrations.** To change registration close and effective registration dates:

1. Click the **Elections** node.
2. Click on the name of the election in the data grid.
3. Click the **Change Election Setup** quick task to open the **Election Setup Wizard**.
4. In the **Election Setup Wizard**, click **Next**.
5. Change the **Registration Close Date** and **Effective Registration Date** to the date of the election.
6. Click **Next**.
7. Click **Next**.
8. Click **Finish**.



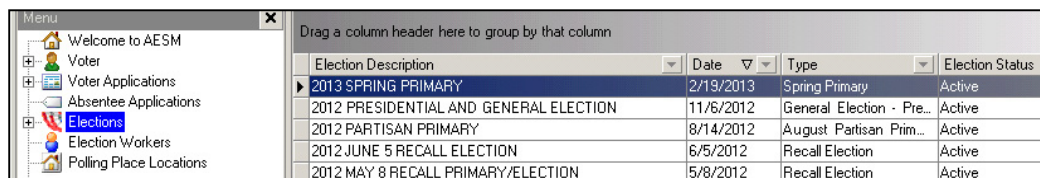
Finally, whenever you create an election you must publish the election on the MyVote.WI website (formally VPA). This will allow voters to view sample ballots for the election you created. To do this:

1. Click the **Elections** node.
2. Double-click on the name of the election in the data grid, to open the election.
3. On the Elections Tab under **Election Status**, check the **Publish Election to VPA** box.
4. Click **Save and Close**.

Check Milestone #2 - Activate the Election

- ☒ You must check the second milestone - Election Active - for an election before adding any contests or candidates to it.

1. Click the **Elections** node.
2. In the data grid, double-click the row containing the election name for which you wish to set Milestone #2.

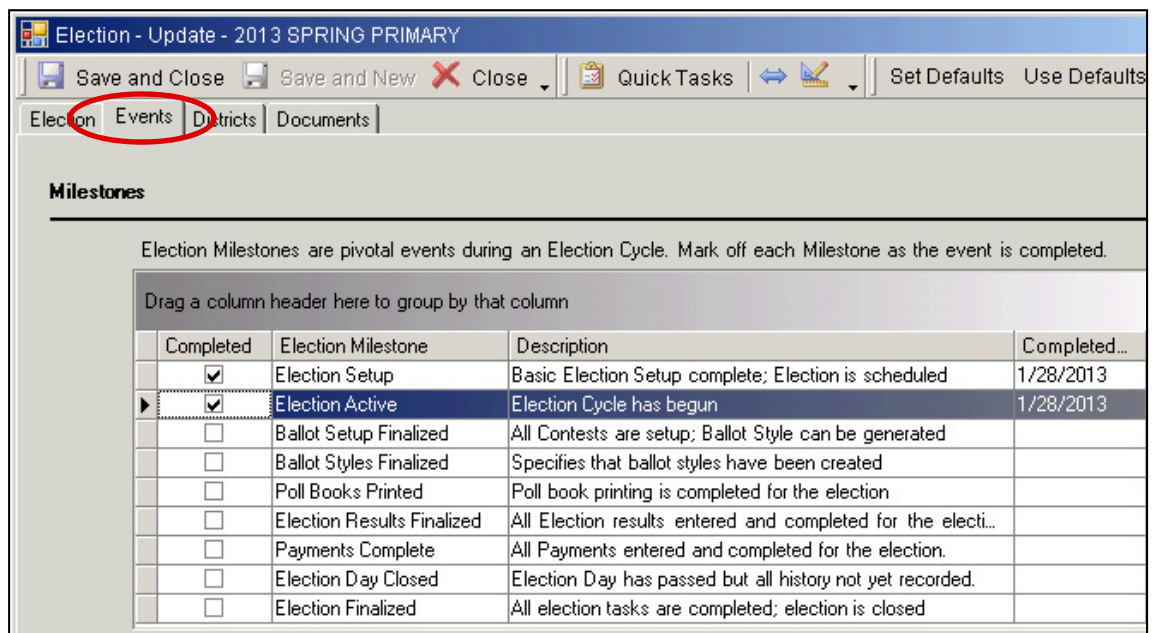


Menu: Welcome to AESM, Voter, Voter Applications, Absentee Applications, **Elections**, Election Workers, Polling Place Locations

Drag a column header here to group by that column

Election Description	Date	Type	Election Status
2013 SPRING PRIMARY	2/19/2013	Spring Primary	Active
2012 PRESIDENTIAL AND GENERAL ELECTION	11/6/2012	General Election - Pre...	Active
2012 PARTISAN PRIMARY	8/14/2012	August Partisan Prim...	Active
2012 JUNE 5 RECALL ELECTION	6/5/2012	Recall Election	Active
2012 MAY 8 RECALL PRIMARY/ELECTION	5/8/2012	Recall Election	Active

3. In the **Election - Update** window, click the **Events** tab.



Election - Update - 2013 SPRING PRIMARY

Save and Close Save and New Close Quick Tasks Set Defaults Use Defaults

Election **Events** Districts Documents

Milestones

Election Milestones are pivotal events during an Election Cycle. Mark off each Milestone as the event is completed.

Drag a column header here to group by that column

Completed	Election Milestone	Description	Completed...
<input checked="" type="checkbox"/>	Election Setup	Basic Election Setup complete; Election is scheduled	1/28/2013
<input checked="" type="checkbox"/>	Election Active	Election Cycle has begun	1/28/2013
<input type="checkbox"/>	Ballot Setup Finalized	All Contests are setup; Ballot Style can be generated	
<input type="checkbox"/>	Ballot Styles Finalized	Specifies that ballot styles have been created	
<input type="checkbox"/>	Poll Books Printed	Poll book printing is completed for the election	
<input type="checkbox"/>	Election Results Finalized	All Election results entered and completed for the electi...	
<input type="checkbox"/>	Payments Complete	All Payments entered and completed for the election.	
<input type="checkbox"/>	Election Day Closed	Election Day has passed but all history not yet recorded.	
<input type="checkbox"/>	Election Finalized	All election tasks are completed; election is closed	

4. In the row reading **Election Active** in the **Election Milestone Column**, select the checkbox in the **Completed** column.
5. Click the **Save and Close** button to save the changes.

Contests



A contest is either a race for elected office or a referendum. Every election must have at least one contest – otherwise, there would be no point! To manage an election in SVRS, you must tell the system which contests there are for that election. SVRS uses the contest information you enter to determine ballot styles, absentee eligibility, and to populate sample ballots on the MyVote.WI website (formally).

GAB creates contests for:

- State and federal offices
- Statewide referenda

Counties create Contests for:

- County, school district, sanitary district, multi-jurisdictional judge and technical college offices
- County, school district, sanitary district and technical college referenda

Municipalities create Contests for:

- Municipal offices
- Municipal referenda

Jurisdictions may share responsibility for:

- Sanitary District, Lake Management District, and Multi-Jurisdictional Judge district contests that occur in multiple municipalities

NOTE – For the remaining 2012 elections, the GAB, not Counties, will create the contests for all School Districts, Technical College, Multi-Jurisdictional Judge races. Counties will only be able to add candidates for those races.

Add a Contest for Elected Office

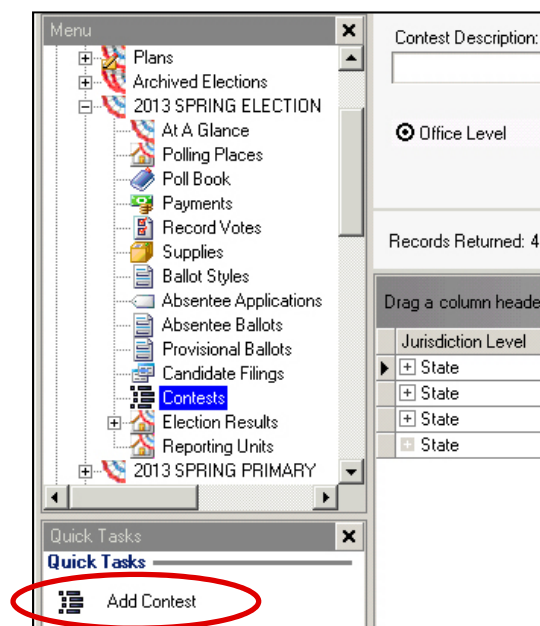
1. Expand (+) the **Election** node.
2. Expand (+) the **Election** to which you wish to add contests.

3. Click the **Contests** node.



If you inherited this election, you may see contests already entered by other (state or county) jurisdictions in the data grid.

4. Click the **Add Contest** Quick Task.



5. In the **Office Position** box, click the selection for the office type to be elected.



*The selections in the **Office Positions** box are determined by the **Office Types** you have created.*



*If you are not seeing a selection for a particular office, see the [Districts & Offices](#) chapter for instructions on creating a new **Office Type**.*

6. The **Description** box will default to the selection you made in the **Office Position** box.

- a. Retype the description. For example, instead of "REEDSBURG ALDERPERSON AT-LARGE" type "CITY OF REEDSBURG ALDERPERSON AT-LARGE".

- b. If this contest is for an office with numbered seats that are elected at-large, enter the seat number in the **Description** box.

- c. If this contest is for a Partisan Primary election, type in the name of the political party in the **Description** box.

- d. Remember your **Contest Description** will appear in the sample ballot available on the **MyVote.WI** website and **Canvass Reports**.

7. In the **Ballot Instruction** box, select from the drop down the number of candidates that can be selected. For example, if a voter can select up to three candidates for a contest, select "VOTE FOR NOT MORE THAN THREE". The "VOTE FOR ONE – if you vote in this section . . . "should only be used for partisan primaries.



*If a **Ballot Instruction** option does not appear, but needs to be added to the drop down, please call the G.A.B. Only G.A.B. staff can add new ballot instructions to the drop down menu.*

8. Once a ballot instruction is selected, the field to the right will display the description and ballot instructions as they will appear on MyVote.WI ballots. To make changes to this field, change the description or ballot instructions fields.

ALDERPERSON (AL1)	ALDERPERSON (AL1) - VOTE FOR NOT MORE THAN THREE
VOTE FOR NOT MORE THAN THREE	

9. In the **Ballot Position** box, enter a number corresponding to that contest's place on the ballot.

Ballot Position:	5000
------------------	------



The Ballot Position determines the order of contests on each voter's sample ballot, viewable from the MyVote.WI website. If the Ballot Position number is incorrect, you may receive calls from voters and candidates asking about that sample ballot.



Currently the G.A.B. will setup all School District contests, Multi-Jurisdictional Judge contests, and Technical College contests, in addition to the normal state-level contests. Counties and municipalities may not enter these contests, and must forward their contest information to the G.A.B.

Office Contests Numbering Scheme for Ballot Positions in SVRS:

State:	001000 - 099999
County:	100000 - 199999
Multi-Jurisdictional Judge:	200000 - 299999
Municipality:	300000 - 399999
Union/Unified School District:	400000 - 499999
Common School District:	500000 - 599999
Special District:	600000 - 699999

Referenda Numbering Scheme for Ballot Positions in SVRS:

State:	700000 - 709999
County:	710000 - 719999
Multi-Jurisdictional Judge:	720000 - 729999
Municipality:	730000 - 739999
Union/ Unified School District:	800000 - 899999
Common School District:	900000 - 969999
Special District:	970000 - 999999

August Partisan Primary Numbering Scheme for Ballot Positions in SVRS:

For the August Partisan primary, contests are grouped by party, so all offices for one party need to come before any offices for the next party. The order is based on the number of votes each party's gubernatorial candidate received in the last gubernatorial election.

First Place Party, State Contests:	001000 - 004999
First Place Party, County Contests:	005000 - 009999
Second Place Party, State Contests:	010000 - 014999
Second Place Party, County Contests:	015000 - 019999
Third Place Party, State Contests:	020000 - 024999
Third Place Party, County Contests:	025000 - 029999
Fourth Place Party, State Contests:	030000 - 034999
Fourth Place Party, County Contests:	035000 - 039999
Fifth Place Party, State Contests:	040000 - 044999
Fifth Place Party, County Contests:	045000 - 049999
Non-Partisan Contests and Referenda:	Use numbers given above.

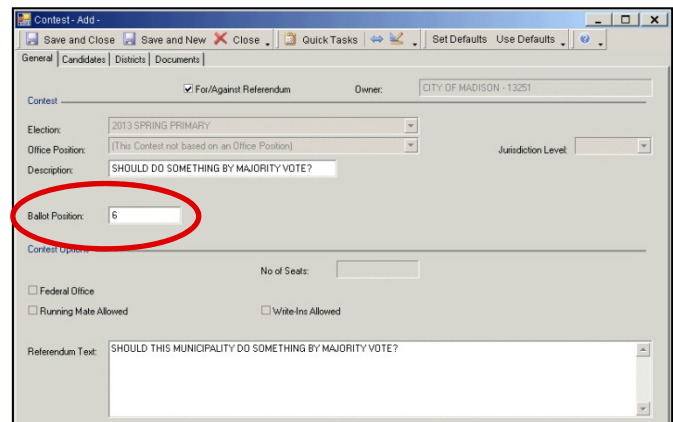
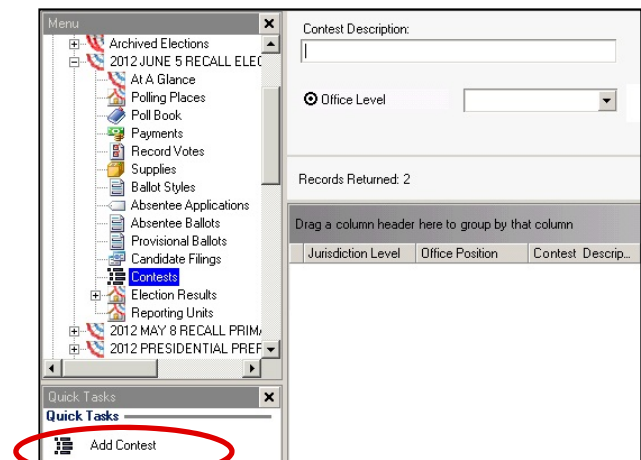
10. In the **No of Seats** box, enter the number of seats for that contest.

This will always be 1 unless the ballot reads Vote for not more than X. In that case, enter whatever **X** is.

11. Click **Save and Close**.

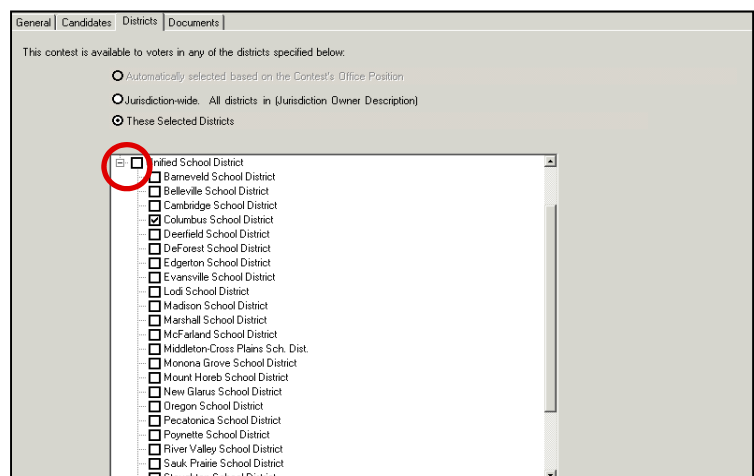
Add a Contest for a Referendum

1. Expand (+) the **Election** node.
2. Expand (+) the election to which you wish to add a contest.
3. Click the **Contests** node.
4. Click the **Add Contest** Quick Task.
5. Select the **For/Against Referendum** checkbox.
6. In the **Description** box, type a short description of the referendum.
7. Leave the **Party** box set to Non-Partisan.
8. Leave the **Official Contest No** box blank.
9. In the **Ballot Position** box, enter a number corresponding to that referendum's place on the ballot.



*In statewide elections, the GAB will assign a range of **Ballot Position** numbers for referenda. Please see the note on **Ballot Positions** on the previous page.*

10. In the **Referendum Text** box, type the complete text of the referendum.
 - a. Remember your **Referendum Description** and full text will appear in the sample ballot available on the **Voter Public Access** website.
 - b. SVRS does not have spell check, so it is a good idea to enter the **Referendum Text** in a word document, and cut and paste it into SVRS.
11. If you are adding a referendum that is not Jurisdiction-wide (for a **school district, technical college district, lake management district, or sanitary district**):
 - a. Click the **Districts** tab.
 - b. Select the **These Selected Districts** option button.
 - c. Expand (+) the district type that is having the referendum.
 - d. Select the district which will vote on the referendum.
12. Click **Save and Close**.



Search for and Update a Contest



If information changes or you made a mistake, you are able to revisit a contest record to make changes or updates.

1. Expand (+) the **Election** node.
2. Expand (+) the election the contest you wish to change.
3. Click the **Contests** node.
4. Contests which have been entered are displayed in the data grid.
5. Double-click on a record in the grid to open a **Contest** record.
6. Make changes to the record.
7. Click **Save and Close**.

Jurisdiction Level	Office Position	Contest Description	Official Contest	Ballot Position	Party	No Of Seats	For/Against Issue
State	JUSTICE OF TH...	JUSTICE OF TH...			1 Non-Partisan	1	

Contest - Update - JUSTICE OF THE SUPREME COURT

General | Candidates | Districts | Documents

☐ For/Against Referendum Owner: STATE OF WISCONSIN - WI

Election: 2013 SPRING ELECTION

Office Position: JUSTICE OF THE SUPREME COURT - 2013-2023 Jurisdiction Level: State

Description: JUSTICE OF THE SUPREME COURT JUSTICE OF THE SUPREME COURT - VOTE FOR ONE

Ballot Instructions: VOTE FOR ONE

Ballot Position: 1020

Contest Options

No of Seats: 1

☐ Federal Office ☒ Write-Ins Allowed

☐ Running Mate Allowed




Remember that once you have checked Milestone #3, you will be unable to change **Contests** and **Candidates** for that election. You must uncheck Milestone #3, make any changes, and recheck the milestone. If you are a county level user, and you need to change a contest or candidate, every municipality in your county must uncheck Milestone #3 before you can uncheck it at the county level.

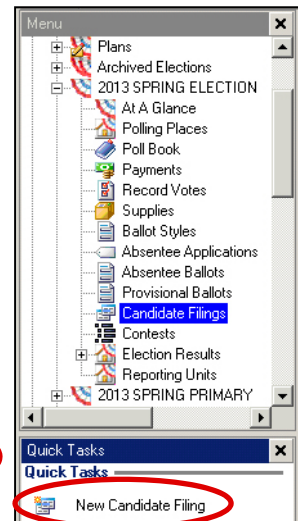
Candidate Filings



Before adding and approving a Candidate Filing for an election, you must have successfully setup the contest for which the candidate is filing and have a Contact Record for the candidate that is viewable to the jurisdiction adding that candidate. See the [Contacts](#) chapter for more information.

Add a Candidate Filing

1. Expand (+) the **Elections** node.
2. Expand (+) the election to which you wish to add a candidate filing.
3. Click the **Candidate Filings** node.
4. Click the **New Candidate Filing** Quick Task to open the **Candidate Filing – Add** window.
5. Click the **Address Book Icon**  to the right of the **Candidate** box to open the **Contact Search** window.
6. In the **Last name** box of the **Contact Search** window, type the candidate's last name.
7. In the **First Name** box of the **Contact Search** window, type the candidate's first name.
8. Click **Search**.
9. If the search results include the candidate's **Contact** record, double-click on that row in the data grid.



Candidate: 

Contact Search

Last Name: First Name: Middle Name: Suffix:

Date of Birth: Soc Sec Num: Party:

House No: Street Name:

City: State: ZIP Code:

☐ Count Only

Drag a column header here to group by that column


Owner	Contact Type	Name	Address	Residential City
CITY OF REEDS...		KUSKA, JAMES R	1460 INVERNESS CT	REEDSBURG



You can only use the **Contact Search** window to find a contact record that is "viewable" to your **Active Jurisdiction**. If the search results do not include the candidate's **Contact** record, close [x] the **Contact Search** window.

You will need to create a new **Contact** record, or open the **Contact** record in its owning municipality and change the record to be viewable at the county or state level. See the [Contacts](#) chapter of this manual for more information on creating or editing **Contact** records.

Candidate Detail

Candidate: 

Candidate Address: 57276-005-4753-1

Election: 2013 SPRING ELECTION

Contest:

Party: Non-Partisan GAB ID#

Ballot Position: 0 Local Cand No:

10. In the **Contest** box, click on the contest in which the candidate is running.

11. You will only change the **Party** if you are setting up a candidate for the September or November Election. The Candidate Filing record should now save the **Party** independently of what is listed in the **Contact** record.

12. The **GAB ID#** is used rarely, usually only for statewide candidates.

13. In the **Ballot Position** box, type a number corresponding to the candidate's position on the ballot for that contest, as determined by random draw.

14. If you use an identifying number for local candidates, you may choose to enter it in the **Local Cand No:** field.

15. Make sure the **Name on Ballot** reflects the name the candidate would like to appear on the ballot.

16. If you choose to track a candidate's filing details in SVRS, you will follow the optional steps below. You will enter data in the **Filing Checklist** and **Nomination Papers** sections of the **Candidate Filing** record, and may choose to print the **WI Nomination Paper Receipt**, the **WI Nomination Paper Sufficiency** form, or the **WI Nomination Paper Verification**. These steps are detailed in the next section.

17. If you do not choose to track candidate filings in SVRS, you only need to enter those candidates who will appear on the ballot. Make sure their **Status – Reason** is **Approved – Approved**.

18. **Save and Close.**

Track Candidate Filings Status in SVRS (Optional)

The GAB tracks Candidate Filing Status in SVRS, including all candidates who register, whether or not they eventually appear on the ballot. Counties and municipalities may choose to track candidate filings here as well.

1. In the **Status-Reason** list box, the initial value will default to **Pending – Filing Period Open**.
2. The **Incomplete Filing** and **Comments** fields may be used as appropriate.

Filing Detail

Status-Reason: Pending - Filing Period Open

Incomplete Filing:

Comments:

3. If you setup the **Office Type** to show items under the **Filing Checklist**, you will see items such as **Campaign Registration Statement**, **Declaration of Candidacy**, **Nomination Papers**, and **Statement of Economic Interests**. You will also see a **Deadline** date associated with each item, and a **Req?** Checkbox indicating if the item is required.

Filing Checklist

Drag a column header here to group by that column

	Description	Deadline	Completed	Amended...	Req?	Changed...	Changed...
<input checked="" type="checkbox"/>	Campaign Registration Statement	1/2/2013	12/10/2012		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Declaration of Candidacy	1/2/2013	12/26/2012		<input checked="" type="checkbox"/>	lowed	12/27/2012
<input checked="" type="checkbox"/>	Nomination Papers	1/2/2013	1/2/2013		<input checked="" type="checkbox"/>	schwot	1/2/2013
<input checked="" type="checkbox"/>	Statement of Economic Interests	1/7/2013	1/4/2013		<input checked="" type="checkbox"/>	lowed	1/4/2013

- a. Please note when you setup your **Filing Checklist** items in the **Office Type** record, you must enter the **Description** exactly as shown in order to make the associated reports work.
 - b. You must update the filing deadlines in the **Office Type** record every election cycle.
 - c. You must check the checkbox at the far left of the item to save changes. The **Completed**, **Changed by User**, and **Changed Date** fields will update automatically. You can manually update the **Completed** or **Amended** columns.
4. Under the Nomination Papers section, the number of signatures entered in the Office Type record will appear in the required field.

- a. You will first select the **Nomination Status** of **Submitted**.
- b. Fill in the approximate number of signatures and pages.
- c. Type in the person who submitted the petitions under **Submitted By** and your own name under **Staff Responsible**.
- d. You should not enter a **Filing Receipt No.** That will be automatically generated by SVRS based on the election and the order in which the filing is received.

Nomination Papers

Nomination Status: Submitted

No. of Signature: 400 Required: 200

Approximate: 400 Valid: 0

Approx. Pages: 40

Submitted By: ERIC LEARN

Staff Responsible: DIANE LOWE

Filing Receipt No: 2013GENEL-5

☐ Supplemental

Suppl. Submitted Date:

Created Date: 2/12/2013 Date Last Changed: 2/12/2013

- e. If the candidate turns in supplemental signatures, check the **Supplemental** checkbox and select a date in the **Suppl Submitted Date**.

5. To print the **WI Nomination Paper Receipt**:

- Click the **Quick Tasks** button at the top of the form and select **Send Mailing** from the **Quick Tasks** panel.
- In the **Mailings** drop-down, select **WI Nomination Paper Receipt**.
- Click **Next**.
- You do not need to filter or sort this mailing.
- Check the **Printer Settings** and make sure that the document will be sent to the right printer.
- Select the **Print Now** button and click **OK**.
-
- A dialog box will appear asking "Did the mailing print successfully?" Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Receipt**
- Receipt** was printed.

- A sample of the report is shown to the right.

6. To print the **WI Nomination Paper Sufficiency**:

- a. Click the **Quick Tasks** button at the top of the **Candidate Filings** form and select **Send Mailings**.
- b. In the Mailings drop-down, select **WI Nomination Paper Sufficiency**.
- c. Click **Next**.
- d. This mailing does not need to be filtered or sorted.
- e. Check the **Printer Settings** and make sure that the document will be sent to the right printer.
- f. Select the **Print Now** button and click **OK**.
- g. A dialog box will appear asking "Did the mailing print successfully?" Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Sufficiency** was printed.
- h. A sample of the report is shown to the right. You will attach this report to the petitions and use it to track several things, including the number of valid signatures and if the number of signatures is insufficient.
- i. **Save and Close** the **Candidate Filing** form. You will return to it when the number of signatures has been verified.



There is also a report available that allows you to print the WI Nomination Paper Receipt and the WI Nomination Paper Sufficiency in one document.

Wisconsin Government Accountability Board
Nomination Paper Sufficiency Form

Receipt No. : 2012SPREL-038
Candidate ID # : 105414
Candidate Name : ALLISON COAKLEY
Address 1 : 1308 MATHYS RD
Address 2 : MONONA, WI 53716
City, State, Zip :
Phone :
Election Date : 04/02/2013 Type : Spring Election
Office : LINCOLN COUNTY CIRCUIT COURT JUDGE, BRANCH 2
Party : Non-Partisan

Date Filed Campaign Registration Statement : September 20th, 2012
Date Filed Declaration of Candidacy : September 24th, 2012
Date Filed Nomination Papers : December 28th, 2012
Approximate Number of Pages : 48
Approximate Number of Signatures : 400

Papers Received from : ☐ Candidate
☐ Mail
☐ Other : _____ Phone : _____

Receptionist : _____
WECF : _____ DOC : _____ Ethics : _____
Agency Staff : _____
Sufficiency Determined by : _____
Number of Valid Signatures : _____

If number of signatures is insufficient, indicate problem below :

Date Candidate Contacted : ____ / ____ / ____
Contacted by : _____
Date of Final Approval : ____ / ____ / ____
Signature of Election Specialist : _____

GAB-351 (Rev. 5/2010)

7. When the number of signatures has been verified, you will reopen the **Candidate Filing** record and change the **Nomination Status** to **Sufficient**. (In some cases you may choose **Insufficient** or **Sufficient with Supplemental**).
8. Enter the number of verified signatures in the **Valid** field.
9. Make sure that the candidate has met all the requirements in the filing checklist before you change the **Status Reason** to **Approved – Approved**.

10. To print the **WI Nomination Paper Verification**:
 - a. Click the **Quick Tasks** button at the top of the **Candidate Filings** form and select **Send Mailings**.
 - b. In the Mailings drop-down, select **WI Nomination Paper Sufficiency**.
 - c. Click **Next**.
 - d. This mailing does not need to be filtered or sorted.
 - e. Check the **Printer Settings** and make sure that the document will be sent to the right printer.
 - f. Select the **Print Now** button and click **OK**.
 - g. A dialog box will appear asking “**Did the mailing print successfully?**” Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Verification** was printed.



After you have printed all three types of Candidate Nomination Paper verification forms, you can go to the Activity Tab of the Candidate Filing record and verify that they were all printed. If you highlight one of the lines in the upper grid, you will see more information in the lower grid.

Activity	Jurisdiction	Updated On	Updated By	Created On	Created By
Mailing		2/6/12/2010	harvea	6/12/2010	harvea
Mailing		2/6/12/2010	harvea	6/12/2010	harvea
Mailing		2/6/12/2010	harvea	6/12/2010	harvea

Mailing Type	Queued On	Printed On	Returned On	Response
WI Nomination Paper Sufficiency	6/12/2010	6/12/2010		

- h. A sample of the report is shown to the right. You will sign this document and transmit it to the candidate.
- i. Make sure that the candidate has met all the requirements in the filing checklist before you change the **Status Reason to Approved – Approved.**
- j. **Save and Close the Candidate Filing form.**

WISCONSIN GOVERNMENT ACCOUNTABILITY BOARD
MICHAEL HAAS, ELECTIONS DIVISION ADMINISTRATOR
212 E WASHINGTON AVE
PO BOX 7984
MADISON, WI 53707-7984
(608) 261-2028

Candidate ID #: 105414
ALLISON COAKLEY
1308 MATHYS RD
MONONA, WI 53716

This is to acknowledge receipt for the nomination papers of
ALLISON COAKLEY
FOR THE OFFICE OF LINCOLN COUNTY CIRCUIT COURT JUDGE, BRANCH 2

Spring Election to be held April 2nd, 2013
Spring Primary to be held February 19th, 2013

Party Affiliation: Non-Partisan
Nomination Papers filed December 28th, 2012
Declaration of Candidacy filed September 24th, 2012
Statement of Economic Interest filed December 28th, 2012

Number of Valid Signatures: 387

This is number of valid signatures determined by the Government Accountability Board staff. This number is subject to challenge within 3 calendar days following the deadline for filing nomination papers.

Verified By _____ Date: February 13th, 2013

GAB-152 (Rev. 5/2010) Nomination Paper Receipt No.: 2012SPREL-038

Search for and Update a Candidate Filing



You can search for and update a candidate filing. Perhaps you noticed a name misspelling and need to correct the spelling.

1. Expand (+) the **Elections** node.
2. Expand (+) the current election.
3. Click the **Candidate Filings** node.
4. On the search pane, enter search criteria and click **Search**.
5. In the data grid, double-click on the row for the candidate record you wish to update.
6. Make changes to the **Candidate Filing** record.
7. Click the **Save and Close** button.



Remember that once you have checked Milestone #3, you will be unable to change **Contests** and **Candidates** for that election. You must uncheck Milestone #3, make any changes, and recheck the milestone. If you are a county level user, and you need to change a contest or candidate, every municipality in your county must uncheck Milestone #3 before you can uncheck it at the county level.

Check Milestone #3 - Ballot Setup Finalized



Checking Milestone #3 for an election indicates that you have added all of your jurisdiction's contests and candidates. Once checked, you will not be able to change contests or candidates within the election without first unchecking Milestone #3.

In an election created by the State:

- Counties cannot check Milestone #3 until the state checks it
- Counties cannot uncheck Milestone #3 until it is unchecked by all municipalities in the county
- Municipalities cannot check Milestone #3 until it is checked by their county or counties
- Municipalities can uncheck Milestone #3 at any time

In an election created by a County:

- Municipalities cannot check Milestone #3 until it is checked by the county
- The county cannot uncheck Milestone #3 until it is unchecked by all municipalities in the county

In an election created by a municipality:

- The creating municipality can check and uncheck Milestone #3 at any time

1. Click the **Elections** node.
2. In the data grid, double-click the row of the election for which you wish to check Milestone #3.

Election Description	Date	Type	Election Status	Date CL
2006 GENERAL ELECTION	11/7/2006	General Election	Active	
2006 PARTISAN PRIMARY	9/12/2006	September Partisan P...	Closed	
2006 SPRING ELECTION	4/4/2006	Spring Election	Closed	
04/05/2005 ELECTION	4/5/2005	Special Election	Closed	12/31/2005
02/15/2005 ELECTION	2/15/2005	Special Election	Closed	12/31/2005

3. In the **Election – Update** window, click the **Events** tab.
4. In the row reading **Ballot Setup Finalized** in the **Election Milestone Column**, select the checkbox in the **Completed** column.

Completed	Election Milestone	Description	Completed...	Completed...
<input checked="" type="checkbox"/>	Election Setup	Basic Election Setup complete; Election is scheduled	9/13/2007	hanseb
<input checked="" type="checkbox"/>	Election Active	Election Cycle has begun	9/13/2007	hanseb
<input checked="" type="checkbox"/>	Ballot Setup Finalized	All Contests are setup; Ballot Style can be generated		
<input type="checkbox"/>	Ballot Styles Finalized	Specifies that ballot styles have been created		
<input type="checkbox"/>	Poll Books Printed	Poll book printing is completed for the election		
<input type="checkbox"/>	Election Results Finalized	All Election results entered and completed for the electi...		
<input type="checkbox"/>	Payments Complete	All Payments entered and completed for the election.		
<input type="checkbox"/>	Election Day Closed	Election Day has passed but all history not yet recorded.		
<input type="checkbox"/>	Election Finalized	All election tasks are completed; election is closed		

5. Click **Save and Close**.

Generate Ballot Styles



Ballot Style refers to the unique set of Contests and Candidates that will appear on a given voter's ballot. All voters with this exact same set of Contests and Candidates will have the same Ballot Style in SVRS. Two voters whose ballots differ by even one Contest will therefore require different Ballot Styles.

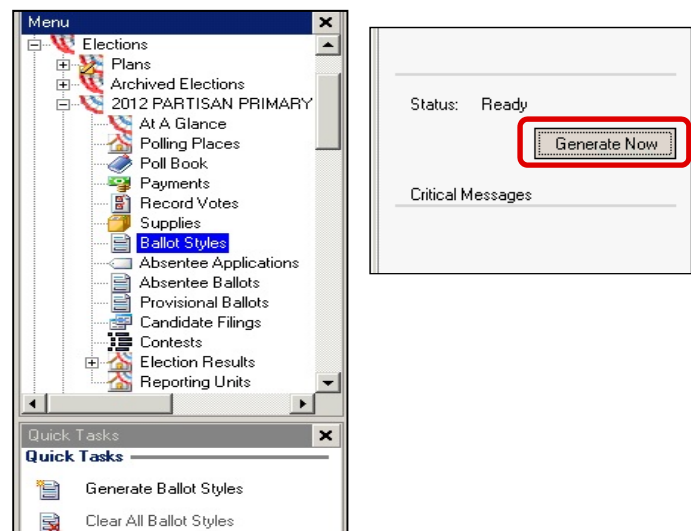
In SVRS, ballot styles are generated at the municipal level, regardless of whether that municipality has added any contests to the election. If a municipality does not generate ballot styles, the poll books printed for that election will not contain the names of any voters. Municipalities cannot generate ballot styles without first checking Milestone #3.

Expand (+) the **Elections** node.

1. Expand (+) the current election.
2. Click on the **Ballot Styles** sub-node.
3. Click the **Generate Ballot Styles** Quick Task to open the **Generate Ballot Styles** pane.
4. If Milestones #1, #2, and #3 are checked, the **Status** will be **Ready**. Click **Generate Now**.

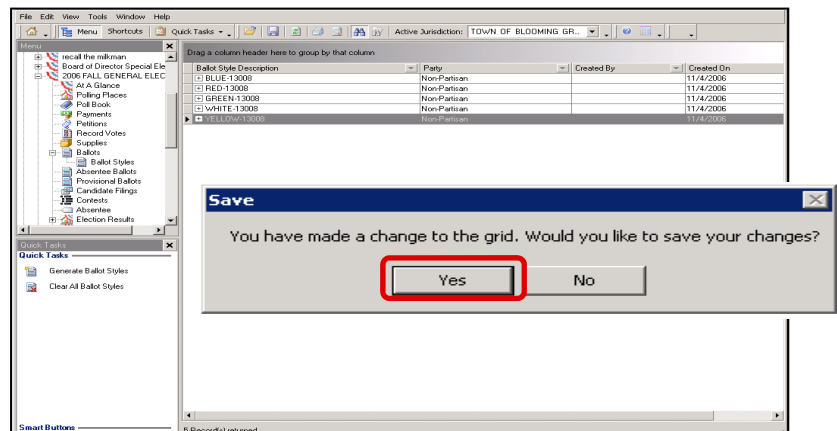


If the **Status** is not **Ready** read the **Critical Messages** and take the appropriate steps. Usually this will mean making sure Milestone #3 is checked and Milestone #4 is not checked.



5. Within a few moments, line(s) of ballot style descriptions will appear in the data grid. Each line on the grid represents a unique combination of contests and referenda.

6. Expand (+) each ballot style on the data. Verify that:
 - a. You have the correct number of ballot styles.
 - b. Each ballot style has the correct contests and candidates listed.



SVRS assigns a description (**NP-1**, **NP-2**, **NP-3**, etc.) to each ballot style. You can change this description by typing directly in the data grid. You cannot use a description that has been used before by yourself or any other user in the state. GAB suggests using a descriptive term followed by the HINDI number and election date, e.g. **"BLUE-0200 -110706"** or **"SPVSR1-02002-040709."**

Put important information (like the color or ballot information) first, because the information at the end may be cut off on the poll list. After changing the description and clicking on a different node, you may get the message, **"You have made a change to the grid. Would you like to save your changes?"** Click **Yes**. The description prints on the poll book and can be helpful to the poll workers.

Check Milestone #4 - Ballot Styles Finalized



Checking Milestone #4 at the municipal level signifies that you have generated and double-checked your ballot styles, and are ready to generate absentee ballots and poll books.

Counties cannot check Milestone #4 until all municipalities in the county also have it checked. Counties should not check Milestone #4 until after an election, in order to allow municipalities greater flexibility in changing contests, candidates and ballot styles.

1. Click the **Elections** node.
2. In the data grid, double-click the row of the election for which you wish to check Milestone #4.

Election Description	Date	Type	Election Status	Date CL...
2006 GENERAL ELECTION	11/7/2006	General Election	Active	
2006 PARTISAN PRIMARY	9/12/2006	September Partisan P...	Closed	
2006 SPRING ELECTION	4/4/2006	Spring Election	Closed	
04/05/2005 ELECTION	4/5/2005	Special Election	Closed	12/31/2005
02/15/2005 ELECTION	2/15/2005	Special Election	Closed	12/31/2005

3. In the **Election – Update window**, click the **Events** tab.
4. In the row reading **Ballot Styles Finalized** in the **Election Milestone Column**, select the check box in the **Completed** column.

Completed	Election Milestone	Description	Completed...	Completed...
<input checked="" type="checkbox"/>	Election Setup	Basic Election Setup complete; Election is scheduled	9/13/2007	hanseb
<input checked="" type="checkbox"/>	Election Active	Election Cycle has begun	9/13/2007	hanseb
<input checked="" type="checkbox"/>	Ballot Setup Finalized	All Contests are setup; Ballot Style can be generated	11/8/2007	pederr
<input checked="" type="checkbox"/>	Ballot Styles Finalized	Specifies that ballot styles have been created		
<input type="checkbox"/>	Poll Books Printed	Poll book printing is completed for the election		
<input type="checkbox"/>	Election Results Finalized	All Election results entered and completed for the electi...		
<input type="checkbox"/>	Payments Complete	All Payments entered and completed for the election.		
<input type="checkbox"/>	Election Day Closed	Election Day has passed but all history not yet recorded.		
<input type="checkbox"/>	Election Finalized	All election tasks are completed; election is closed		

5. Click **Save and Close**.